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ABSTRACT

This publication is a workbook for those attending a "Helping Adults Learn" Workshop designed to assist higher education faculty and staff in promoting greater access and success for adult learners in higher education. An overview of the workshop describes the purpose, goals (to increase understanding of theory and research on adult learning, to assess the impact on adults of current institutional services and programs, and to promote improved services and programs for adult learners) and objectives. Five modules make up the workshop. Module 1 is an introduction and overview; module 2 covers concerns and characteristics of the adult learner; modules 3 and 4 cover facilitating adult learner success in designing instruction; and module 5 considers facilitating the next steps and needed resources. Objectives and suggestions for activities including worksheets for individual and small groups are given for each module. Modules 2, 3, and 4 also offer supplemental material in the form of reprints of the following articles: "The Adult as Learner: A Case for Making Higher Education More Responsive to the Individual Learner" (B. G. Sheckley); "Adapting the University to Adult Students: A Developmental Perspective" (Edmund F. Ackell and others); "Have Learning Begin with Your Lesson Objectives: Guide Learning with Objectives That Take a Student's Perspective (Ronald E. Dodge); and "Essential Skills for the Facilitator of Adult Learning" by (Michael W. Galbraith). A bibliography of approximately 120 items grouped according to module is included. (JB)

ED 302 908

Helping Adults Learn

Participant Workbook

THE CALIFORNIA STATE UNIVERSITY

CENTER FOR INNOVATIVE PROGRAMS

HE 025 729

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- begin to build a subset of information on teaching and learning that supports *The National Teaching and Learning Forum (NTLF)*, ERIC/HE's newsletter;
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Helping Adults Learn

Participant Workbook

THE CALIFORNIA STATE UNIVERSITY

CENTER FOR INNOVATIVE PROGRAMS

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Introduction

Welcome to the "Helping Adults Learn" Workshop. This workshop and accompanying materials were developed with your specific needs in mind.

The adult as a goal-directed learner has rapidly become an impetus for change in institutions of higher education. Nationally, the indicators of change extend from proposed programs for full-time adult students, to individual colleges and universities that offer curricula and instructional activities that are responsive to the needs of adults who live and work in a changing society. A major challenge for educators in the foreseeable future is to accommodate traditional educational patterns to the requirements of the adult learner.

We invite you to draw upon the resources of your colleagues during this workshop and hope that your experience is rich and rewarding.

Overview of the Workshop

Purpose

The purpose in offering this workshop is to engage faculty and staff in activities that could ultimately promote greater access and success for adult learners within higher education.

Goals

The workshop is designed to stimulate interest on the part of the participants, both individually and collectively, to:

- Increase their knowledge and understanding of the theory and research related to adult learning.
- Assess the impact of current institutional services and programs on the access and success of adults.
- Promote needed changes in institutional services and academic programs to better serve adult learners.

Objectives

The workshop activities provide an opportunity for the participant to:

- Explore the views held by theorists and colleagues about adults as learners.
- Discover how institutional services and programs may be barriers to educational success as well as access for adults.
- Consider the implications of concepts such as systematic instructional design, teaching style, and characteristics of effective instructors when planning instruction for adult learners.
- Plan with campus colleagues the next steps to improve instruction and academic support services for adult learners.

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Welcome, Introduction, and Overview

module 1

Objectives

In this part of the workshop, you will have the opportunity to:

- Meet your fellow workshop participants and workshop facilitators.
- Review the workshop objectives and schedule.
- Determine how your expectations of the workshop fit into today's agenda.
- Consider your institution's response to the adult learner.

Small Group Activity

Your fellow participants

Individual Activity

After reviewing the goals and objectives in the workbook overview, what would you hope to gain from this workshop?

The Adult Learner: Characteristics and Concerns *module 2*

Objectives

In this part of the workshop, you will have the opportunity to:

- Consider demographic and societal changes that contribute to an increased need for educational opportunities for adults.
- Consider your perceptions of adult learners from the standpoint of diversity.
- Identify modifications you could make based on a discussion of adult learner diversity.

Presentation

Who Adult Learners Are

Unlike the traditional full-time student, for whom the educational experience is their major preoccupation, the adult learner must juggle a variety of roles and demands simultaneously.

Numerous attempts have been made to develop a workable definition of the "adult learner." Some educational theorists differentiate adult learners from other individuals by chronological age (e.g., all students over 23, 25, or some other age). Others see developmental state, cognitive complexity, learning goals, or degree of self-direction as the distinguishing characteristic rather than age. A rather common definition focuses on the complex social roles of the adult learner who is typically a spouse, parent, employee, and community member in addition to being a student. For example, Arthur Chickering, for the National Commission on Higher Education and the Adult Learner, defines "adult learner" as an individual whose major role in life is something other than full-time student.

Nationally, approximately 50% of students enrolled in institutions of higher education are over 25.

Hodgkinson, 1985

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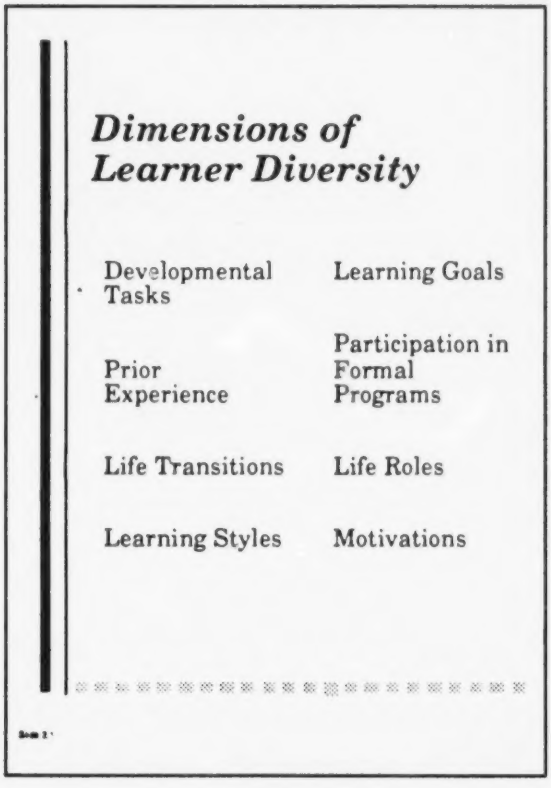
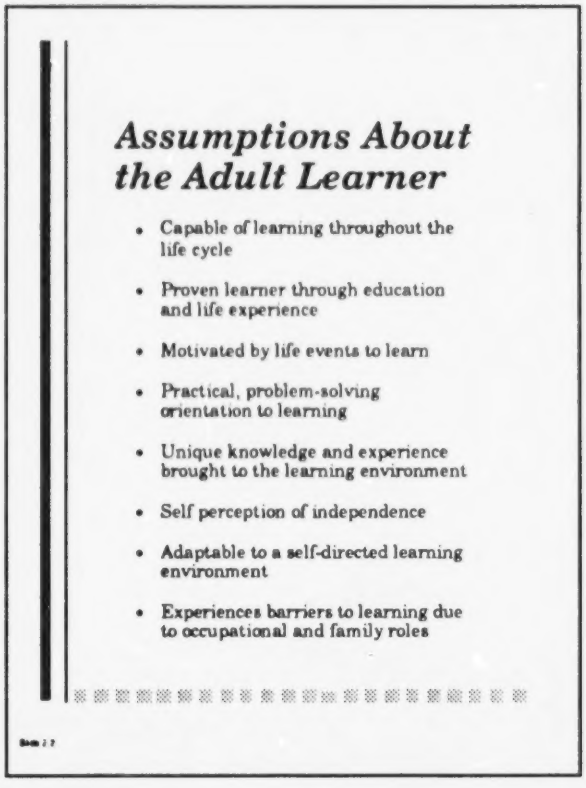
Group Activity

Based on your experience, identify characteristics of adult learners in relation to the dimensions summarized in slide 2.1.

Presentation:




Assumptions About the Adult Learner
• Capable of learning throughout the life cycle
• Proven learner through education and life experience
• Motivated by life events to learn
• Practical, problem-solving orientation to learning
• Unique knowledge and experience brought to the learning environment
• Self perception of independence
• Adaptable to a self-directed learning environment
• Experiences barriers to learning due to occupational and family roles

Group Activity

Consider your own institution and identify ways in which higher education is responding to the adult learner.

Planning Ahead

Based on the discussion of diversity among adult learners, begin a list of changes you could make to improve your work with adult learners.

1.

2.

3.

4.

5.

THE ADULT AS LEARNER: A CASE FOR MAKING HIGHER EDUCATION MORE RESPONSIVE TO THE INDIVIDUAL LEARNER

From CAEL News. "The Adult as Learner: A Case for Making Higher Education More Responsive to the Individual Learner," by B. G. Sheckley, 1984, Columbia, MD: Council for Adult and Experiential Learning. Reprinted by permission.

At the recent Council for Adult and Experiential Learning (CAEL) institute, Adults as Learners: Research to Practice, we spent an entire evening discussing the field of adult learning. Many interesting questions were posed: Is the adult a unique learner? Are all adults necessarily adult learners? What do we mean by "adult learner?" Is there a discipline we can call adult learning? What are the key differences between adult and "non-adult" learners? Can we describe how the adult learns? Is there an adult learning style? When we speak of the "adult learner", which individual learner are we talking about? Do the central issues relate to being an adult or to being a learner? Are issues of access and financial support for adult learners appropriate public policy issues?

The engaging debate of these questions—which lasted several hours that evening and never abated during the remaining days of the institute—led to some interesting conclusions. First, the term "adult learner" is a nominal label for a heterogeneous cohort of learners. Not only are these "adult learners" participating in higher education in increasing numbers but also, they are widely diverse in their learning interests, educational goals, individual differences, experiential backgrounds, motives for pursuing learning projects, and patterns of participating in formal classroom programs. Secondly, there is no single characteristic of "adult learners" which is not present—to some degree—among all learners. In other words, the adult learner represents an extreme on a continuum depicting a range of diversity among all learners. Thus, when college educators speak of the adult learner, they may be using an extreme prototype which exemplifies the increasing diversity of the college student population. Additionally, the greatest impact of the adult learner on higher education might be through the individual and personal examples which suggest that the higher education system needs to be more responsive to the educational interests of individual learners. Finally, if we are to improve the specific practice of adult education and the general practice of higher education, we must develop accurate perspectives on what we mean by "adult learner."

Is there a theory about adults as learners?
While there is an increasing body of research on the adult learner and an accompanying growth of suggestions relating to principles of effective practice in teaching adult learners, there still seems to be a lack of connection between existing research and practice. In one sense, this is understandable since, as K. Patricia Cross (1981) writes, there is no comprehensive theory addressing all the complexities of adults as learners. In fact, as Cross notes, theory is one of the most underutilized vehicles for understanding the various aspects of adult learning. According to Cross (1981), there is not a strong emphasis on theory in adult education because of: "...the enormous diversity of adult learning situations, the practitioner domination of the field, the market orientation of nonsubsidized education and, frankly, the lack of desire or perceived need for theory" (p. 221).

Although there is no comprehensive theory addressing all aspects of the phenomenon adults as learners, there is research in related fields (e.g., developmental psychology, clinical psychology, etc.) and research about the practice of adult education which advances our

understanding of adults as learners. Let us begin with this research to discuss the issue of the adult as a different learner.

Is the adult a different learner?
A key difference between what some refer to as the adult learner and the so-called traditional 18-24 year old student relates more to being an adult than to being a learner. This fact is reflected in the various attempts to develop a workable definition of "adult learners." The Commission on Higher Education and the Adult Learner, for example, defines "adult learner" as an individual whose major life role is something other than full-time student (Chickering, 1983). The emphasis on adult roles as a definition of adult learner is perhaps accurate since a review of the research on learning provides few distinctions that separate adults as different learners.

There is a lively debate on the question: are adults different learners? Although the first discussion of this issue began around 1926 as Lindeman advocated a practical approach to adult education, the question came into sharp focus with Malcolm Knowles' ideas about the adult learner as a neglected species (1978). Knowles described a difference between pedagogy (i.e., the art and science of teaching children) and andragogy (i.e., the theory of adult learning). Andragogy was based on four assumptions: 1) An adults' self-concept is invested in being self-directed; 2) Since adults have rich reservoirs of experience, teaching must emphasize analysis of experience; 3) Readiness to learn is related to developmental tasks; 4) Adults have a problem-centered orientation to learning.

The usefulness of andragogy is inconclusive. There are questions about andragogy as a learning theory, a philosophical position, a political reality, or a set of hypotheses subject to empirical verification (Cross, 1981). As noted by Cross (1981), it is not clear whether Knowles is advocating two distinct approaches to teaching, one for children and a different one for adults. The issue is clarified as Knowles states: "So I am not saying that pedagogy is for children and andragogy is for adults, since some pedagogical assumptions are realistic for adults in some situations and some andragogical assumptions are realistic for children is some situations...each is appropriate given the relevant assumptions" (1979, p. 53).

As with others attempting what might be called philosophical approach to characterizing the adult as a different learner, Knowles has more success in establishing an argument for an acceptable alternative to traditional education than in establishing the adult as a unique learner.

Another attempt to understand the differences which set the adult learner apart followed a path of "clientele analysis." In this approach, adults who participated in formal educational programs were surveyed and described in attempts to understand those characteristics which made them distinct. Coolican (1974) notes two limitations of these studies: 1) The tendency to forget the differences within groups while focusing on differences among groups; and 2) The focus on participation in formal instruction and not on the whole pattern of learning both in and outside the classroom. Taken together, the "clientele analysis" studies indicated that prior education, as the major predictor of participation, cut across all demographic descriptors (Cross, 1981). Additionally, the demographic characteristics only accounted for about 10 percent of the variance associated with participation in organized instruction (Anderson and Darkenwald, 1978). In other words, the clientele analyses did not note characteristics of adult learners which conclusively distinguish them from all other learners.

A third line of research on the adult learner investigated the learning behavior of individual

adults. Allen Tough (1979), for example, found that adults tended to be very pragmatic and self-directed learners. In comparing the learning behavior of adults to those of young 10 and 16 year old learners, he concluded: "The data suggest that the out of school learning projects of young learners are fairly similar to adult projects" (1979, p. 23). While this research provided an understanding of the individual learning behavior of adults, it did not provide a distinctive picture of the adult learner. Clearly this research pointed out that many of the distinctive aspects of the adult as learner were a matter of degree and, sometimes, many of the distinctions were as great within groups of adult learners as between groups of older and younger learners.

The line of research related to individual development and individual differences delineates some issues specific to adults. This research shows that adults at different points in their lives have different learning interests and different perspectives on learning. Initially, these differences were seen as directly related to age, as in the ages and stages research (e.g., Gould, 1978). Recent research (e.g., Schlossberg, 1983), however, suggests that the transition itself is the important event—regardless of the age when it occurs. In other words, adults are not distinct learners just because they are going through life transitions. People of all ages—children not excluded—encounter life transitions. The challenge to education is to provide helping environments for learners of all ages undergoing life transitions. The major characteristic distinguishing adult learners is the wide heterogeneity of their life transitions.

Finally when we look at the learning process itself, Parsons (1978) notes that adults learn using the same processes of learning as do younger students. The only difference is that the interference effect seems more predominant among adult learners. In other words, because adult learners tend to have more responsibilities and complications in their lives than younger learners, there is more "interference"; thus, memorization and recall are more difficult for adults. McClusky (1970) refers to this as a principle of "margin"—or the resources and abilities a person has to devote to learning after he/she takes care of the demands made on him/her by self and society. From this perspective, the adult learner is different from a traditional student in that the adult learner has more "interference" and less "margin" for learning. However, this distinction is not particular to adult learners; it applies equally to learners of any age who have a wide range of responsibilities.

The major challenge adult learners present to the educational system is a wide diversity of interests, styles, motives, developmental tasks, life roles and patterns of learning. If the issue of diversity is seen as continuous—and not dichotomous— then the adult learner represents one extreme of the continuum. As the educational system adapts to the individual educational interests of the adult learner, the capability for improving the educational systems response to individual learners all along the continuum is greatly enhanced.

Diversity: A Key Characteristic of Adult Learners

The distinctive characteristic of the adult learner is diversity. As depicted in Table 1, the "adult learner" represents a heterogeneous group of learners who are widely diverse in learning styles, motivation for learning, life transitions, life roles, learning goals, developmental tasks, prior experience, and patterns of participation in formal educational programs.

TABLE 1
A Continuum Depicting Diversity Among Learners

TRADITIONAL STUDENTS	ADULT LEARNERS
HOMOGENEITY	HETEROGENEITY

DIMENSIONS OF CONTINUUM

Learning Styles	Motivation
Life Transitions	Life Roles
Developmental Tasks	Learning Goals
Prior Experience	Patterns of Participation in Formal Programs

In Part II of this article, we will discuss characteristics which, as a matter of degree, tend to distinguish the adult learner as a special learner and which require the higher educational system to provide alternatives. The common practice of offering standardized programs designed to meet the learning needs of a homogeneous population will not accommodate adult learners. As K. Patricia Cross (1974) discusses, opening the door to educational opportunity is not enough. "For some students who have been underrepresented in colleges, the door to traditional postsecondary education opens only on more of the same kind of education that has failed to serve them in the past" (Cross, 1974, p. xi). The challenge is to develop an educational system which responds to the individual needs of all learners. As higher education adapts to the diversity and unique needs of the adult learner, the capacity to respond to the educational needs of all learners will be enhanced.

Which characteristics of adults require the educational system to adapt?
While adults may not be different learners, there are ways adults differ from traditional 18-24 year old students which require the higher educational system to adapt. Although these differences are highlighted by adult learners, they are present to some degree in all learners and provide a strong argument for altering aspects of the existing higher educational system.

Adult learners must adapt to a rapidly changing world
While some sources attribute the phenomenon of adult learning simply to increasing numbers of adults, there are factors other than a demographic shift which seem to be operating. Cross (1981), for example, notes that the rate adults participate in organized instruction has increased two and one half times as fast as the growth of the eligible population. Not only are more adults participating in organized instruction, but they are also participating to a much greater degree than ever before.

Our rapidly changing world provides a strong impetus for adults involved in various life roles to engage in continuous learning. Cross (1981) lists several changes which have encouraged the growth of what she terms "the learning soci-

ety." Specifically, factors such as job obsolescence, increased participation of women in the labor market, increased longevity, job competition, increased leisure time, an aging work force, higher aspirations and social acceptability of career change all contribute to radically changing career and educational patterns. In analyzing our changing social patterns, Yankelovich (1981) discusses the new rules evolving in our society as we move from depression era values to instrumental values and new expressive values. Besides these social changes, technological changes in all fields require continuous education to remain competent. Technological advances result in radically different ways of doing things. These social and technological changes spur adult learning.

Oxnard (1982) states that anyone who conceives of the changes higher education needs to make in serving adult learners only as accommodating increased numbers misses the entire point. Specifically, he discusses the new educational interests of adults for assistance in making a mid-life career change, for the skills needed to stay abreast of the technological advances in a current career field, for leisure time activities and for adjusting to new life roles.

Although the various career, community and related life roles of adults require them to participate in continuous learning to stay abreast of changes, these same pressures are now impinging, albeit to a lesser degree, on traditional 18-24 year old students as they grapple with issues such as the prospect of five to seven career changes during their lifetime. As higher education provides flexible options for the adult learner to stay abreast of a rapidly changing world, the educational opportunities of all learners are improved.

Adult learners are usually pragmatic

The pragmatic nature of adult learning was introduced by Lindeman in 1926 when he wrote that the approach to adult education should be via the route of situations, not subjects. This approach is even more appropriate today given our rapidly changing world.

In studying individual adult learning projects, Tough (1979) describes how pragmatic interests motivated adult learners. He found that most people started their learning project because they wanted to use the knowledge or skill to take action, and continued their project because they wanted to use the knowledge or skill to take action, and continued their project because they anticipated using the learning in a concrete manner such as performing some responsibility at a higher level. Similarly, in a study conducted with community college students, Sheckley (1983) found that immediate use was the reason most adults gave for undertaking learning projects. Penland (1977) found that 76 percent of the learning projects reported by adults related to practical topics such as business, jobs or child care. Tough (1979) also found that one reason adults chose to conduct self-planned learning projects—instead of participating in an institutionally based program—was their belief that they would actually lose time by turning the responsibility for planning over to someone else. In summarizing the research on "why adults learn," K. Patricia Cross (1981) concludes that most adults are responding to transitions in which needs for new job skills or for knowledge about family life serve as "triggers" to initiate learning activity.

The pragmatic nature of adult learners accentuates the importance of personal knowledge as opposed to objective knowledge (Dewey, 1938). According to this principle, the more personally relevant the learning is, the more motivated the learner is to pursue the learning. The principle applies to learners of all classifications. As the educational system adapts to accommodate the pragmatic interests of the adult learner, it will provide opportunities for all learners to conduct

personally relevant learning projects.

Adult learners are developing over an entire lifespan

There is a new appreciation of adult potential and of adult development. In only a decade, the study of adults as learners has changed from an investigation of decay and decline to an analysis of growth and potential. Thorndike (1935) for example, studied the decline of adult IQ and performance as a function of age. More recently, Horn (1979) has shown that, while speed and performance may decline with age, the ability to synthesize and apply information increases with age.

The ideas of adult development as a lifelong process originally proposed by Carl Jung and Erik Erickson have been expanded more recently by Levinson (1978), Gould (1978), and Loevinger (1976). There are three specific implications of the developmental stage research for adults as learners. First, adults at different stages of development would have different learning interests reflective of different capacities and different perspectives on the world. Secondly, education can play an important role in stimulating movement from one stage to the next. Finally, the developmental process will vary as a function of individual differences.

A related line of research discusses how life transitions promote adult learning (e.g., Aslanian and Bricknell, 1980; Schlossberg, 1983). From the transitions research we can understand that adults learn because transitions are an inevitable part of life, and change creates the challenges and stimulation that promote learning and therefore development.

The developmental focus so important to understanding adult learners has important implications for learners of all ages. For example, Chickering (1981) argues that individual development is a central mission of institutions of higher education. Thus, as the higher educational system adapts to accommodate the different developmental ages and stages of adult learners, it also increases important developmental learning opportunities for all learners.

Adult learners are heterogeneous

Although individual differences exist among individuals of any age group, the range of differences increases dramatically among older adults. According to Chickering (1981) and Knowles (1978), as individuals grow older they tend to demonstrate an ever increasing range of individual differences. Neugarten (1976) describes the process of "individual fanning out" by noting that there is greater variability among a group of 60 year olds than among a group of 10 year olds.

These differences have important implications for understanding adults as learners and for designing facilitating learning environments. Increasingly, the research on individual differences demonstrates that adult learners come to the college classroom with a wide array of individual differences which may not match the prevailing classroom environment which usually assumes a relatively homogeneous student population. For example, Kolb (1981) describes how individuals have individual learning preferences. Tough (1981) discusses how adults vary in their tendency to be self-directed learners. Heath (1964) delineates how three distinct temperaments developed and learned best within a university setting. Rotter (1966) develops the idea that individuals differ in the perception they have of the amount of control they exercise over the environment. Some individuals, for example, believe that luck, fate, or chance controls their lives while others believe that they control their own destiny.

From the research on individual differences, we know that there is a range of variability within

any group of learners. From the research on adult development, we know that this range of variability increases with age. One of the greatest challenges adult learners present is the wide range of individual differences they bring to the classroom. As higher education adapts to this heterogeneity, the capability to accommodate individual differences among all age groups will be increased.

Adults are constantly learning

As previously noted, adult learners are individuals whose major life role is something other than full-time student. Accordingly, adults, in their various life roles, have wide range of learning resources available to them. Several research studies show that adults actively use these resources (Sheckley, 1983).

When a broad definition of what constitutes "learning" is used, the research suggests almost all adults are constantly learning. Petersen (1979), in describing the sources of education and learning in the United States, suggests that "virtually everyone" uses individual and personal sources of learning. In a study of the educational pursuits of the American adult Johnstone and Rivera (1965) found that approximately one person in five had been active in some form of learning during the twelve-month period before the interview.

In his investigations, Tough (1979) used the concept of learning project to study the learning behavior of adults. He defined learning project as a series of related episodes adding up to at least seven hours. "In each episode, more than half of the person's total motivation is to gain and retain certain fairly clear knowledge and skill, or to produce some other lasting change in himself" (Tough, 1979, p. 6). Tough found that the average adult in his study spent 700 to 800 hours each year completing eight separate learning projects. One major outcome of Tough's studies was the validation of the extent of adult learning, or, as noted by Coolican (1975), the question regarding adult learning was no longer whether adults learned, but how much they learned.

The research of Tough (1979), Petersen (1979), and Johnstone and Rivera (1965) provides an interesting contrast to a more traditional view of adult learning as participation in an institutional based program of study. Whereas the studies cited above suggest that virtually all adults are learning, the National Center for Education Statistics (NCES), using a very traditional view of adult learning, reports that only 12 percent of adults in America participate in organized learning. These contrasting viewpoints, when combined, provide an accurate perspective on two conclusive aspects of adult learning: 1) Adults are constantly learning; and 2) Only a small percentage of their learning occurs in a classroom.

This research indicating that adults are constantly learning presents several challenges to institutions of higher education. First, the challenge to increase access to institution based educational resources for learners who are not interested in classroom based programs. Secondly, the challenge to expand classroom based programs to use the experiential learning resources adults encounter in their various life roles outside the institution. Next, the challenge to structure the academic program so that it builds on the experiential learning adults have acquired in their various life roles and does not require them to repeat learning they may have acquired in an extra-institutional setting. Finally, the challenge to recognize the wide diversity of learning individual adults have acquired outside the academy.

As institutions of higher education adapt to the heterogeneous backgrounds and the extra-institutional learning of individual adults, and use the rich experiential learning opportunities

available in respective adult life roles, the opportunities for learners of all ages will be improved.

What are the implications for higher education?

Throughout this article, we have seen that the major challenge presented by the adult learner is an issue of diversity. Chickering (1983) discusses how educational practices at many institutions are oriented to serve a narrow range of educational and developmental possibilities. Because of the diversity within any population of adult learners, an institution serving adult learners simply cannot design its educational program for an assumed range of homogeneous student interests. When adult learners are involved, the homogeneity does not exist.

When an institution has an adult student population, the institution must be able to serve adult learners who are adapting to a changing world, have a pragmatic orientation to learning, are progressing through various developmental stages and are frequently undergoing role and status transitions, are becoming more unique with each passing year, are constantly learning in a wide variety of settings, and have a great many demands on personal time, energy and emotions. As institutions make this adaptation to serve the wide diversity of individual educational needs and interests of adult learners, education opportunities for all students as individual learners will be increased.

The changes required for this adaptation do not represent a wholesale restructuring of higher education. As noted by Chickering (1983) all that is required is a shift of attitude so that administrators, counselors and faculty can have some room to maneuver as they make changes to accommodate an increasingly diverse student population. According to Chickering (1983), the changes involve more flexible and varied alternatives for access, greater recognition of personal, professional and social contexts, recognition of prior experience and use of ongoing experiences and responsibilities, greater responsiveness to individual responsibilities, and greater integration of theory and practice.

These changes are neither monumental nor impossible. Many institutions have already made changes to respond to the diverse cohort of adult learners. Such programs deviate from traditional college programs in one or more of eight dimensions: location, time, student learning objectives, content, learning activities, learning resources, evaluation and authority (Chickering, 1983). As these changes are made, the programs become more responsive to individual learners.

Looking closely at what must be done to adapt higher education to serve the adult learner, we understand that the shift relates to accommodating an increasingly diverse learner population. If we are serious about adapting higher education to the diverse educational interests of the adult learner, we also improve the ability of higher education to accommodate individual differences among all learners. As we state a case for adapting to the adult learner, we make a strong case for improving the capacity of higher education to respond to the educational needs and interests of all learners as individuals.

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Facilitating the Access and Success of Adult Learners: Designing Programs

module 3

Objectives

In this part of the workshop, you will have the opportunity to:

- Consider the relationship between program design and factors affecting retention and completion rates.
- Consider the impact of existing student services on adults as learners.
- Conceptualize an ideal array of student services.
- Identify changes that might improve student services for adult learners in your institution.

Presentation

Barriers Confronting Re-Entry Students

Institutional Barriers
- Policies and requirements
- Procedures and practices
- Inconvenient schedules and locations
- Inappropriate courses of study

Situational Barriers
- Employment obligations
- Family responsibilities
- Transportation to classes
- Financial constraints

Dispositional Barriers
- Time and management
- Reactions of family, peers, etc.
- Lack of self-confidence
- Skills

K. Patricia Cross

Factors Affecting Completion Rate

Re-entry Student Factors
- **Reduced load per semester**
- **Combined school and employment**

University Factors
- **Difficulties in enrolling in major courses**
- **Scheduling difficulties with General Education Courses**

California State University
Office of Analytic Studies,
1988

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Components of Program Design

Effective Program Design is based on learner characteristics and includes appropriate:

- Admission Competencies / Requirements
- Outcome Competencies
- Degree Completion Requirements
- Content and Sequence (Courses)
- Degree Completion Options
- Student Support Services
- Delivery Systems
- Evaluation Plan

Types of Entry Services

- Recruitment
- Admissions
- Financial Aid
- Orientation
- Counseling and Advisement
- Developmental Assessment
- Assessment of Prior Learning

Types of Ongoing Services

- Academic advisement
- Personal counseling, developmental mentoring, and career planning
- Extended access to facilities and personnel
- Assessment and learning resource centers
- Remedial / advanced placement services
- Distance learning options
- Life services (housing, family care, health, food, transportation)

Types of Exit Services

- Culminating overview and planning course
- Reviews with advisor and counselors
- Career planning and placement services

Individual Activity

For the next 5 minutes use the following two columns to identify the policies and procedures for the institutional support services that you think help the adult learner and those that hinder the adult learner. You will then be asked to share your ideas with your small group.

Institutional Support Services That Help the Adult Learner	**Institutional Support Services That Hinder the Adult Learner**

Small Group Activity

This Small Group Activity is divided into two parts.

Part I: Share your perceptions of the helpful and hindering aspects of institutional support services. Relate your discussion, when possible, to the characteristics of adult learners. Use the space below to record areas of concern.

Part II: Based on the concerns your group has just discussed, identify elements that would be found in the ideal array of student services -- those that would have the most positive impact on adult learners from entry services, ongoing services, and finally, culminating and exit services.

Each group will be asked to report back to the group-at-large.

Planning Ahead

In the space below, begin a list that identifies possible actions you might consider taking now and in the future to bring about change in campus student services that would facilitate the access and success of adult learners.

1.

2.

3.

4.

5.

Summary: *Facilitating Access and Success*

I. PROGRAM DESIGN

While the most crucial interface between the student and institution typically occurs in the classroom in the form of specific teaching-learning activities, that is only one part of the total educational experience. The learner is also affected by a wide array of policies and operating procedures at the departmental, institutional, and, in multi-campus structures, system level.

When planning educational programs for adults, certain questions must be raised.

- Does the curriculum respond to the unique needs of the adult learner?
- Do admission policies promote or impede access (e.g., policies on out-dated coursework, partially com pleted G. E. programs, non-transferable lower-division courses, etc.)?
- Are academic support services appropriate to the adult learner available and accessible?
- Is instruction available in a variety of modes to accommodate the life/work situations of adult learners?
- Are degree completion options available which acknowledge the adult learner's prior learning?

Because faculty are responsible for making policy, it is important that they understand the impact of such issues on the adult learner.

Ideally, these issues would be dealt with as a whole in designing a curriculum. Based on an understanding of the characteristics of the learner group to be served, an effective program design would address the following issues:

- Admission Competencies/Requirements
- Outcome Competencies
- Degree Completion Requirements
- Content and Sequence (Courses)
- Degree Completion Options
- Student Support Services
- Delivery Systems
- Evaluation Plan

A systematic program development process is the key to insuring that the program meets the need and *will* facilitate access and success. The process hinges on answering the question: who are the learners to be served by the program—what is their educational background, how and where do they live and work, what are they expecting to achieve as a result of further education, what barriers do they confront in returning to school, etc.? To be effective, the program must be based on answers to these questions.

This systematic and learner-centered program development process is outlined in further detail in the Center for Innovative Programs' document entitled Adult Learner Education System and in other articles listed in the Bibliography.

II. ADULT LEARNER BARRIERS AND SUPPORT SERVICES NEEDS

Adult learners bring to their educational experience numerous assets. They are typically highly motivated, have a wealth of background experiences gained from work and other life experiences, and have proven themselves to be successful learners in a variety of settings.

Unfortunately, adults also typically confront

numerous obstacles in returning to school which both block access to higher education and success once admitted. These obstacles result from the complex life/work situation and part-time student status of most adult learners, and from the fact that their previous formal education may have been years ago. Unlike the traditional full-time student, for whom the educational experience is the major preoccupation, the adult learner must juggle a variety of roles and demands simultaneously. Without proper support, these demands—which include occupational, family, and/or community responsibilities—may become barriers to higher education. A leading adult learning theorist, K. Patricia Cross, has suggested the following categories of obstacles commonly confronting the adult learner:

Institutional Barriers. Educational procedures and practices that prevent or discourage adult learners. These include admission and transfer of credit policies, class scheduling, and access to necessary services such as the admissions office, library, and academic advising.

Situational Barriers. Obstacles arising from an individual's current life situation. For example children needing care or supervision, transportation to classes, and financial constraints.

Dispositional Barriers. Peoples' attitudes and perceptions of themselves as learners. Many, if not all, adult learners struggle at one time or another with issues such as finding adequate time to complete classwork, lack of self-confidence ("Am I too rusty?" "Will I fit?"), and adverse family/work/community reactions resulting from their reduced availability for other activities.

Because they were typically designed for the younger and full-time student, most higher education institutions are not prepared to deal effectively with the above mentioned barriers. Appropriate student support services are too often either limited or nonexistent. There is considerable evidence that effective support services contribute to both retention and progression of learners of all ages. In addition to such pragmatic considerations, it can also be argued that these services simply enhance the quality of the educational experience—and that adult learners deserve this enhancement to the same extent as younger traditional age students. In order to achieve genuine involvement in learning, or institutions must provide a place where adult learners feel they *matter* and *belong*.

To at least some extent, older learners have somewhat different support services needs and interests than their younger traditional age colleagues. Further, the great majority of older learners are also part-time/non-residential students, resulting in additional differences in individual life demands and priorities from their full-time/residential counterparts. Adult learners are by definition a heterogeneous group. The challenge for higher education is to design student support services for that diversity.

Adapting the University to Adult Students: A Developmental Perspective

Edmund F. Ackell, with the assistance of
Rozanne G. Epps
Nicholas A. Sharp
Howard L. Sparks

INTRODUCTION

Ever since the G.I.'s went back to school in the late 1940's, adult students have been increasing their importance in American colleges and universities. During the latter 1970's, especially, there was significant growth in the rate of participation of adults in college. Under the impact of this growing number of adults in classrooms, average student ages have gone up, percentages of part-time and evening-only students have increased, and clearly observable shifts have been taking place in student interests in both curriculum and services. Increasing demands for professional curricula, especially at the graduate level, for evening and weekend classes, and for typically adult-oriented services ("mid-life" counseling, flexible requirements, and even child-care, to name only three) all reflect the increasingly important role of working, non-resident students who come to college part-time, night or day, bringing a different set of problems and expectations with them.

Many causes can be educed for this new impetus for adults to return to college, either to complete their basic degrees, to extend their education with post-graduate study, or simply to study for personal and professional enrichment. The general societal concern for credentials, the almost militant spirit of "professionalism" that has developed in all sorts of vocational fields, and the increasing sophistication of organizational and technological skill demanded by contemporary institutions have all combined to make today's adult keenly aware of his/her need for continual updating and expanding of knowledge and skill. And this is a trend which will, almost surely, continue to increase throughout the forseeable future.

As a result, hardly a college or university in the country has failed to make some kind of adaptation to the adult students who, in ever increasing numbers, seek to avail themselves of higher education. The nature and kinds of adaptations have varied, of course, depending on the history and mission of each institution, on the various developments of federal and , especially, state-level education policies as they have been applied in different regions and states, and on the social, political and, crucially, the economic environment within which each institution exists. And yet, even within these variations, it remains true that only a very small number of American colleges and universities has in the last 5-10 years failed to develop some kind of adaptations to the needs of adult students, and some institutions have made substantial modifications in their structure and functioning in order to accommodate themselves to this new group of students.

In this paper, the intent is to suggest two main things about this process of adaptation and change. First, the process is developmental and this developmental or evolutionary adaptation can be conceptualized as three "stages," or steps. They range from a relatively primitive organizational stage through a more

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[1]Edmund F. Ackell is President of Virginia Commonwealth University. This paper was originally prepared in 1981 for the Commission on Higher Education and the Adult Learner and is used in this manual with permission of the principal author. The views expressed are the authors' and do not necessarily reflect the opinions of the Commission. In this article, "university" is used in its generic sense to include both colleges and universities.

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specialized kind of adaptation or "final stage" in which a college or university has fully adapted to the large-scale presence of adults within its organization. Second is the focus on the transition process by which universities and colleges move from the intermediate stage to full adaptation to adult needs and interests. This part of the paper will emphasize especially the organizational processes necessary for the change and, at times, will move from purely observational and descriptive (albeit informal and non-rigorous) statements to relatively proscriptive and judgmental statements about what should be done to make the adaptive process flow smoothly if not painlessly.

Before launching into this process, however, a minor demurrer should be offered. As stated, the paper will be examining a developmental process, a process by which universities adapt and modify themselves in relation to the new presence of large numbers of adults in their midst. At times, it may sound as though the final stage in this process is a goal to be sought, an ideal condition toward which **all** colleges should strive. Obviously, that is not intended. Depending on the individual institution—its mission, history, and physical location—various stages of the adaptive process will be appropriate and "right" at various times. For some colleges, a fairly primitive stage of adaptation, referred to here as the **laissez-faire stage**, may be "right."For another, the second or **the separatist stage** may be appropriate. And for yet another, anything less than a full **equity stage** may be wrong. Moreover, as with any developmental process, virtually any college or university may show varying degrees of development along varying axes of measurement. A college may have developed into a final stage of adaptation along one dimension while still retaining a comparatively primitive level along some others. A college may have developed excellent procedures for recruiting, admitting, and teaching adults while still having a fairly crude or even non-existent system of providing services. Much of the paper will be aimed at the process of achieving full transition into stage three, the equity stage, and will be directed primarily towards institutions under the heavy impact of large numbers of adults and, thus, are feeling strong pressures to adapt and modify toward a final or equity stage. In no small measure, these pressures are merely an extension of the civil rights movement, the notion that all citizens have equal rights to services for which they pay, either directly (taxes) or indirectly (through participation in the economy which supports endowment funds), and thus they often have a moral, constitutional or legal dimension to them. However, the basic point is that the process of growth into an equity model for adult students is not in any real sense a moral or necessary obligation but is simply an inevitable process of development which at least some universities should go through when adult students achieve a certain level of importance.

DEVELOPMENTAL STAGES

Stage 1. The "Laissez-Faire" Stage

For most institutions attempting to cope with an influx of adult students, the first stage is simply to remove any barriers or artificial constraints on adults (e.g., age requirements for admission, required parental consent forms, etc.) and, thus, to let the adults do the best they can within a system that works neither for them nor against them. This is a **laissez-faire** stage in that adults are allowed to be as entrepreneurial and aggressive as they choose to be in dealing with the institution, but there is no official or organized administrative intervention. Typically, at this stage an institution will have the following characteristics with regard to adult students:

- no active recruitment
- no special support services
- no curriculum development efforts specifically for adults
- no institutional planning which takes adult needs into account
- no faculty development efforts for dealing with adult students
- an overall institutional assumption that students' problems are specific to their role as students, regardless of age.

Stage 2. The "Separatist" Stage

Because the basic assumption that age is a non-significant variable in student needs and problems is radically false, any institution that deals for long or in substantial numbers with adult students will probably move toward the next stage of development. This is the **separatist** stage in which adults are essentially segregated from the major student body and given separate, specifically developed programs which, while better than none, are given demonstrably lower priority and status than the traditional ones. Moreover, within this stage, it can be argued that adult students become subject to a certain degree of economic exploitation or, at least, that their services and programs are measured by different academic and fiscal yardsticks than traditional programs. Academically, they are too often weaker services while, fiscally, the institution expects them to operate with substantially less general fund support than is given to programs for younger students. Other characteristics of this stage include:

- a clearly segregated and identified adult or evening unit
- a separate faculty for this evening unit consisting of adjunct or part-time faculty and some regular faculty employed separately in the adult unit
- limited transferability of credits from the adult or evening program to the "regular" program
- limited or tightly controlled process for evening students to take day classes and for day students to take evening classes
- different programs and degree requirements within day or regular programs and evening or adult programs
- separated and different services (registration, scheduling, admissions, advising, etc.) for adult students
- limited non-instructional student services for adults
- low status for administrators of adult programs as reflected in limited or no access to university policy-making processes.

Stage 3. The "Equity" Stage

A university or college that lives for very long with the separatist model will soon begin feeling the inherent contradictions and paradoxes that develop when two groups are given "separate but equal" treatment. Soon, they will feel the need for equity, meaning an active use of the principles of justice and fairness to correct inequities in a system that *de facto* discriminates against one group in favor of another. As soon as it begins attempting to treat adults fairly and to give them the same quality and quantity of service as it gives younger students, an institution has begun to evolve toward the final or **equity** stage of development. Perhaps, with the exception of a handful of "non-traditional" and mostly brand-new institutions, no fully developed equity stage colleges or universities now exist in this country. However, some universities have moved so far beyond the separatist stage that the characteristics of a full-fledged equity institution can be clearly discerned, at least in nascent form, and the characteristics of such a fully developed equity model institution can be listed with a good deal of confidence. They include:

- active recruitment of adult students
- appropriate delivery systems for adult learning included as part of the general instruction system of the institution
- fully integrated curriculum, i.e., one in which adult courses and "regular" courses are the same and in which students from both age groups mix comfortably
- fully integrated faculty, i.e., a faculty for whom evening or adult classes are a usual part of the regular teaching load
- faculty development programs to improve teaching for both adults and younger students
- provision for degree credits by prior learning (CLEP, military education, etc.) within both "regular" curricula and any special adult programs

- administrative services such as registration and financial aid and information are made available by phone, mail, etc., and during evenings and weekends, within the context of the appropriate unit, rather than separately
- academic advising available on weekends and evenings
- personal counseling, financial advising, career counseling, and other student services available in the evening and responsive to adult problems
- appropriate admissions criteria and procedures for adults
- support services (day-care, peer-counseling, orientation sessions, etc.) for adults
- senior policy-making bodies of the university aware of adult students (it is important that these include fully-empowered administrators representing adult student concerns)
- university administrative policy and procedures developed and implemented with a full range of students, including adults, in mind
- administrative policy and practice is proactive rather than reactive in its mode of dealing with adult students, their needs, and their problems.

THE PROCESS OF DEVELOPING AN EQUITY INSTITUTION

Change is never easy, and growth is always incremental. Both people and organizations always adapt to the present by building on a foundation of behaviors and structures developed in the past. Thus, change is generally uneven, coming rapidly and easily in one growth area but slowly and with difficulty in another. But change does happen. Separatist systems which worked in 1960 may have become counter-productive by 1980, and an institution will necessarily try, with varying ease and degrees of success, to adapt the non-functional systems and to develop better ones.

This part of the paper will reflect on the institutional growth process and identify ten key development points which are central to the evolution into an equity model. Keeping these processes in mind can facilitate change where it is occurring and, at least, make the evolution more comprehensible if not less painful.

1. When a university has developed a substantial adult constitutency it should modify its mission statement to clearly express a commitment to adults and should have this change fully understood and endorsed by the governing board.
2. The president and his executive staff, especially the chief academic officer, must clearly, frequently, and consistently articulate the university's commitment to adults when dealing with university employees, to include not only the deans but especially the faculty and the administrative staffs of the central administrative units.
3. University long-range planning must consistently address the needs of adults as a major constituency of the university.
4. The president and key members of the governing board must consistently work to develop a personal and institutional philosophy which emphasizes a commitment to serve and educate adults as equal members of the academic community rather than as a market to be exploited in support of the university's "real" mission, i.e., to prepare youth to enter the world.
5. At the academic policy level, the institution must clearly and thoughtfully address the difference between "traditional" or "conventional" requirements for admission, transfer, and (especially) residency and the "real" or functional requirements necessitated by the academic programs. In other words, the university will surely recognize that while any academic program requires a certain amount of intensity and continuity not every program requires that students spend two consecutive semesters of full-time study in order to meet the program's educational goals. The distinction between "conventional" and "real" requirements can be crucial in forming academic policies supportive of adults.

6. The university will need to develop policies regarding scheduling of classes and teaching loads which place significant emphasis on student need and interest as well as on faculty preferences and administrative convenience. In other words, courses must be scheduled in times and places, including evenings, weekends, and off-campus locations, where adult students can get to them, and yet where there is no diminution of academic quality or credibility. This process must be made part of the regular class scheduling procedure.
7. The academic rules and regulations must be made responsive to adult students' needs for streamlined bureaucratic procedure and, more importantly, they must actively attempt to seek equity in the application of rules to students of varying ages and circumstances. In other words, the process of establishing academic rules and regulations must recognize that a "reasonable and fair" rule for a resident nineteen-year-old may be "unreasonable and unfair" for a 38-year-old housewife. Therefore, the regulation process itself must seek to build an equitable means for applying rules differently but fairly to various students.
8. The university must recognize that adult students operate in different time-frames from traditional students and, thus, require longer, later operating hours for many university functions. The university must identify offices and functions which adult students need and extend the operating hours of appropriate offices and services.
9. As part of its overall managerial practice, the university needs to develop evaluation and objective-setting processes which speak specifically and uniformly to identifying and meeting the needs of adults. When, for instance, the registrar's office evaluates its performance and sets its objectives it should include specific objectives concerning adult students' registration needs. Similarly, all other administrative and academic units must address questions of adult needs in terms of goals and performance standards.
10. Student services, from the top-level down, must develop processes and positions having specific responsibility and authority for identifying and meeting the service needs of adults. In each area of student services, the needs of adult students must be addressed consistently and equitably with the needs of younger students.

CONCLUSION

This list of developmental processes could be expanded substantially. It gives, however, a significant indication of the kinds of changes which occur as institutions develop from a separatist stage into an equity stage of dealing with adult students. It is not an easy or simple growth process; it is a complex and difficult one. It involves, finally, virtually all aspects of the university's structure and function, from the board right down to the clerks and the typists. It is a process which modifies, over time, not just part of the institution but the entire institution.

Perhaps the easiest way to summarize the change is to lift some words from the final report of the Carnegie Commission on Non-Traditional Study. The words they use to define non-traditional study can be applied equally to the operating style and institutional philosophy of an equity stage university. When it has achieved an equity stage of development, the institution

> ...puts the students first and the institution second, concentrates more on the former's need than the latter's convenience, encourages diversity of individual opportunity rather than uniform prescription, and de-emphasizes time, space and even course requirements in favor of competence, and where applicable, performance. It has concern for the learner of any age and circumstance, for the degree aspirant as well as the person who finds sufficient reward in enriching life through constant, periodic, or occasional study. (*Diversity by Design*. San Francisco: Jossey-Bass, 1973, p. xv).

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Facilitating Adult Learning: Designing Instruction

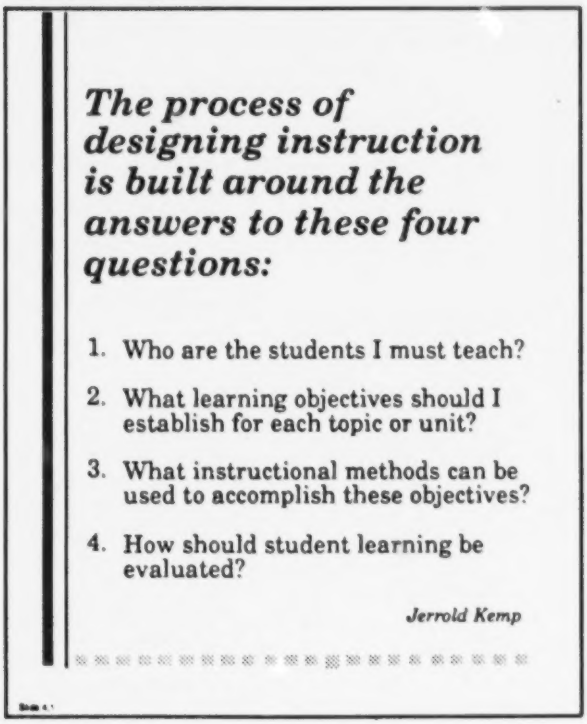
module 4

Objectives

In this part of the workshop, you will have the opportunity to:

- Consider a systematic approach to designing instruction.
- Understand the importance of learning objectives to designing instruction for adults.
- Explore instructional methods and evaluation techniques appropriate for adult learners.

Presentation


The process of designing instruction is built around the answers to these four questions:
1. Who are the students I must teach?
2. What learning objectives should I establish for each topic or unit?
3. What instructional methods can be used to accomplish these objectives?
4. How should student learning be evaluated?
Jerrold Kemp

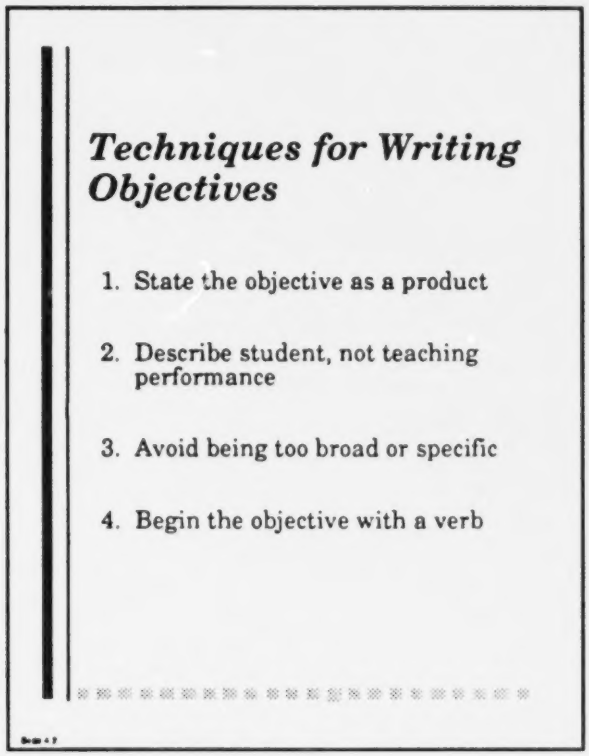
Individual Activity

Think of one group of students you work with, preferably one that includes adult learners. Describe these students along such dimensions as motivation, past experience, learning styles, gender, ethnicity, age, etc.

Small Group Activity

Share your descriptions with others in your group, and add any new dimensions to your own list.

Presentation


Techniques for Writing Objectives
1. State the objective as a product
2. Describe student, not teaching performance
3. Avoid being too broad or specific
4. Begin the objective with a verb

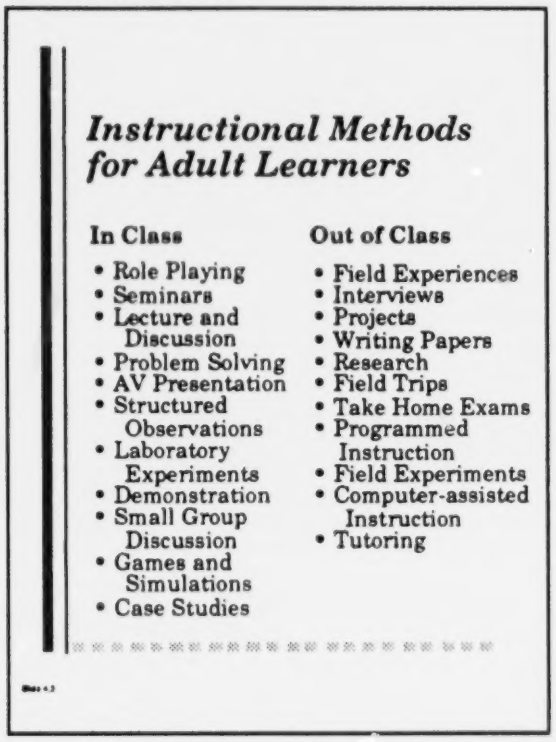
Individual Activity

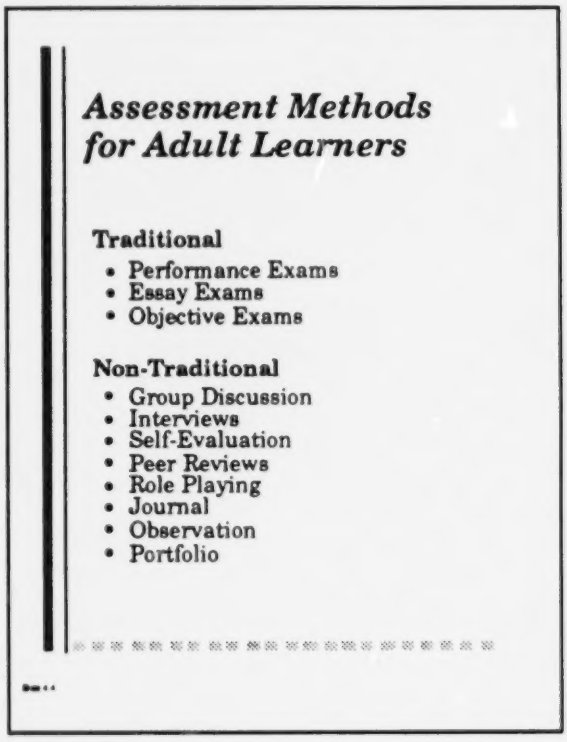
Write one objective for the group you identified in the previous exercise.

Small Group Activity

Have each person share his/her objective with the group. Offer constructive suggestions to improve the way the objective is stated. Note suggestions for your own objective below.

Presentation



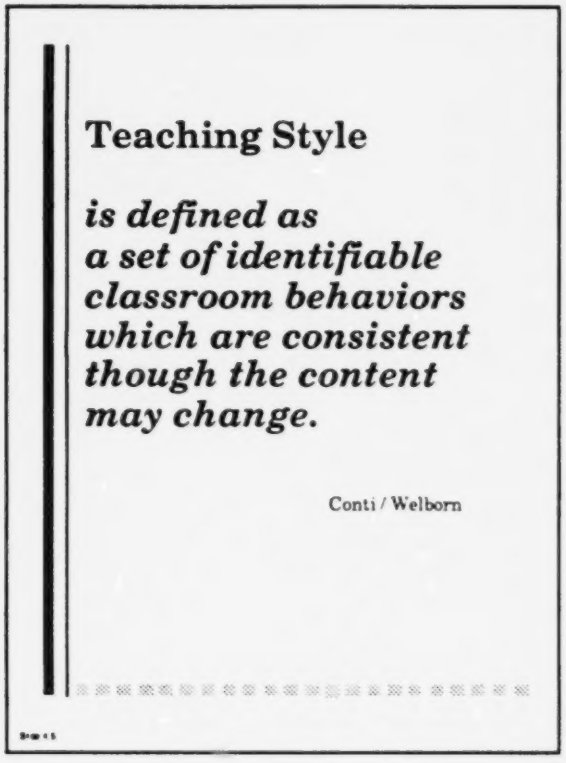


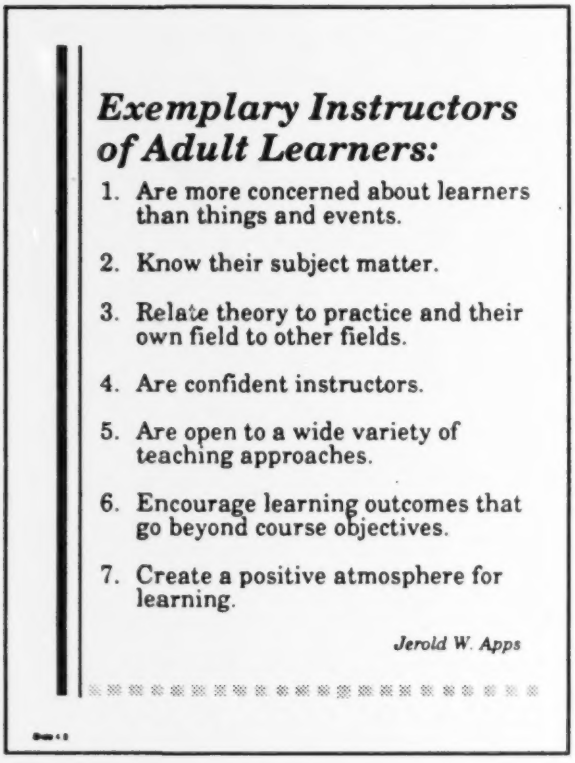
Small Group Activity

Have one person volunteer to share his/her objective and brainstorm, in depth, the following:

Instructional Methods	Ways to Demonstrate Achievement

Presentation




Exemplary Instructors
of Adult Learners:
1. Are more concerned about learners than things and events.
2. Know their subject matter.
3. Relate theory to practice and their own field to other fields.
4. Are confident instructors.
5. Are open to a wide variety of teaching approaches.
6. Encourage learning outcomes that go beyond course objectives.
7. Create a positive atmosphere for learning.
Jerold W. Apps

Individual Activity

Now think about <u>how</u> you do what you do. Given the group you identified, what does this suggest about your preferred teaching style and how does it fit in with what has already been discussed? What changes would you have to make in your present teaching style to accommodate these learners?

Planning Ahead

Begin a list of possible actions you might consider taking to insure that your teaching style and/or instructional designs are responsive to adult learners.

1.

2.

3.

4.

5.

A CHALLENGE

Jerrold E. Kemp
Coordinator, Instructional Development Services
San Jose State University

Wouldn't it be great if instruction could take place like this—

Classes are limited to 12-15 students who are highly-motivated and well-prepared. Each class is scheduled at your preferred time. You have a teaching assistant to help with details and to handle the class when you need to be away. As you find it necessary, you lecture, use seminar techniques, or instead of meeting the class, assign project work.

Need we go further with this dream!

Such an ideal situation may exist in some graduate programs. But in undergraduate education most professors face large-enrollment or regular-size classes comprised of students with a range of abilities, varied background preparation, and different levels of motivation. In addition, the content you must repeatedly teach can offer you little intellectual challenge, while the amount of subject matter you must cover continues to expand.

How can you approach the ideal situation described in the first paragraph within the actualities of the real academic world outlined in the second paragraph?

Before suggesting an answer to this question, let us identify some important reasons for why most of us initially entered this profession of teaching in higher education. They bear directly on how you approach your teaching and the results you can derive from it.

- Intellectual stimulation inherent in teaching and pleasure of interacting with students
- Satisfaction of organizing and then communicating knowledge in your discipline to students
- Gratification of guiding students in successful accomplishment of learning goals you set for them
- Opportunities to pursue interests in research, writing, public service, and consultation

In order for you to satisfy these needs, you should examine how you might better handle the various aspects of the teaching process. Ask yourself such questions as these:

- Are there better ways to organize my subject content so the structure will be logical and clear to students?
- How can I find out more about my students—their interests, needs, academic background, and preparation for my course?
- Then, how can I use this information to better motivate and guide students to learn?
- How can I give more attention to individual students within the framework of large enrollment classes?
- Are there alternatives to conventional lecture-discussion-homework-examination procedures that can help me do a better job and give me more satisfaction in my teaching?
- In what ways can I better use newer technologies for instruction and to assist students in their learning?

As you search for answers to the above questions, many new ideas and innovative practices should become evident to you. There are numerous opportunities to modify traditional instructional methods and student groupings so as to approach the ideals described in the opening paragraph of this article. For example, available resources now allow us to make group instruction more dynamic and individualized instruction more effective. The result can be a change in your role from being primarily a dispenser of information to a person who guides and counsels students. These are more humane functions for you and for students.

What is needed first is an awareness that change in instructional practices for many courses has become necessary. Then second, to implement a systematic plan for assessing needs, setting priorities, and considering new instructional methods. The process by which we examine, and relate the various aspects

of teaching that can lead to more effective and rewarding instruction is called instructional design.

The instructional design process is built around answers to these four questions:

1. Who are the students I must teach?
2. What learning objectives should I establish for each topic or unit?
3. What instructional methods can be used to accomplish the objectives?
4. How should student learning be evaluated?

These four basic elements—student characteristics, learning objectives, instructional methods, and learning evaluation—are the framework for systematic instructional planning. In addition to these key elements, there are other components which often require attention. They include carefully organizing subject content for the objectives treating each topic, selecting resources to support instructional activities, and specifying support services like facilities, equipment, personnel, and budget to carry out the instruction.

When all elements are carefully integrated, a complete instructional design plan is developed. Space does not permit a further explanation of the details and procedures for applying this instructional design process. For reference, see The Instructional Design Process by Kemp (Harper & Row, 1985) or other books on the subject by Gagne/Briggs/Wager and Dick/Cary.

Professional assistance and guidance may be necessary in following a plan for selecting and implementing new instructional methods. On most CSU campuses, there are personnel who serve as qualified "instructional designers." Such an individual can assist you to examine a course for modification, to initiate a new course, and to carry out the necessary planning steps and their implementation. In addition, the CSU Center for Innovative Programs provides such a service, especially for inter-campus course projects.

Funds are available from various sources that can be used for reassigned time, for professional and technical assistance, and for the purchase of resources and services to support either minor or major instructional design activity.

By systematically applying the elements of an instructional design plan, the following can occur:

- Learning experiences can be more meaningful and interesting so that students will b e motivated to continue with their studies.
- Satisfactory learning can take place at an acceptable competency level for the majority of students.
- Positive professional experiences can be achieved through this planning, implementation, and evaluation process.
- Instruction can be accomplished with due regard for reasonable expenditures of money and time.

Find out and try out how the process works and the benefits to be derived for yourself and for your students.

Good luck.

Have Learning Begin with Your Lesson Objectives:

Guide Learning with Objectives that Take a Student's Perspective

by Ronald E. Dodge

What am I going to be able to do after I finish this lesson? This is a question every lesson objective should be able to answer. So, if a lesson has objectives, there should be no problem finding out what the lesson is about. Right?

Well, not always. When you look at the way some objectives are written, it seems that they exist only because they're "supposed" to be somewhere. After all, haven't we learned that "lessons need to begin with objectives"?

Some people believe this, so when they write a lesson, they make sure they have objectives. It doesn't matter if anyone will ever read them. They're there because they're supposed to be. It's the correct thing to do.

Well, it's true: Lessons do need objectives. But beginning them with objectives doesn't guarantee that the objectives are going to do anything useful, that they are going to guide any learning, or that they are even going to be read.

To have learners pay attention to them, objectives need to be written from the learner's perspective. They need to be written so that they clearly tell people what they are going to be able to do. If they are written this way, they will be read, they will serve a purpose, and they will become useful to the learner. It's as simple as that. Well, how do we get useful objectives? And now does this differ from what we've been told all along?

A Well-Written Objective

Exactly what is a well-written objective? We've been taught that an objective has three parts:

1. A statement of *givens* to let students know what will be available to them when they begin.
2. A measurable *behavior* or action—something learners do that can be observed.
3. *Criteria* which specify exactly what constitutes successful completion of that action.

With all these components in place, there should be no problem for anyone reading the objective. Right?

Well, again, not exactly. Unfortunately, some trouble can, and often does, occur. It begins when the writers of objectives leave out *the* important ingredient: a student perspective. What happens is that objective writers forget to consider the student's point of view as they try to write an objective that includes all the givens, behaviors, and criteria. This often results in something that's difficult to understand.

Here's one example:

> Given a problem with a modem interface and the appropriate documentation, the student will be able to correctly perform the steps necessary to troubleshoot the malfunction to a failing circuit board so that, after replacing the failing board, a "pass complete" indication may be obtained from diagnostic software.

This objective contains the three parts every good objective should have. From an academic standpoint, it appears sound. It certainly describes something someone is supposed to do. But the problem is that it's hard to understand. Even though it has all the proper components, it fails to serve the needs of a learner. It fails to guide learning.

The problem with our example is that the behavior to be learned is buried within the wording of the objective. Somewhere between what is stated as a given and what is specified as criteria, is a behavior someone is supposed to accomplish. It didn't get buried intentionally. It was something that happened as the writer of the objective concentrated on constructing a good, three-part objective. The person just thought more about getting the three parts together than describing a behavior to be learned.

Take another look at the objective used in our example. It's one you might actually find being used in computer training. What does it say? Well, after several readings, it becomes apparent that it has to do with troubleshooting a modem interface problem. (A modem interface is part of a computer communication system.) The desired behavior is to find a circuit board that's causing the interface to fail and replace it. To

start out, students will be given the problem and the documentation they need to locate it. The criteria for demonstrating that the interface has been successfully fixed is to run diagnostic software and get a "pass complete" indication.

All this was interpreted after several readings and a little head scratching. This involved more time than the average student would probably want to invest. (Most would rather do better things like get on with the lesson at hand.)

Rules for Better Objectives

What follows, then, are seven rules to help you avoid problems like this. These guidelines will not only help you write better, more understandable objectives, but they will also help you develop a learner-orientation toward objective writing. Instead of first considering the basic elements of an objective and then writing accordingly, these guidelines will have you first consider how to convey a desired behavior to someone – and then write accordingly.

Let's see how.

Because we are interested in writing an objective from a learner's perspective, how about taking out the phrase "the student will be able to"?

Rule 1: Drop the phrase, "the student will be able to."

This may, at first, seem inconsistent. If we are trying to adopt a student perspective, why should we take out the reference to students? Well, by doing so, the objective begins to sound more like a direction and, therefore, begins to provide direction. It gets away from dealing with a "third person." Instead, it tells you what *you* are going to do.

This is the result:

> Given a problem with a modem interface and the appropriate documentation, correctly perform the steps necessary to troubleshoot the malfunction to a failing circuit board so that, after replacing the failing board, a "pass complete" indication may be obtained from diagnostic software.

Good. We are beginning to get some direction. Now, let's try something else.

Rule 2: Define normal or "given" conditions at the start of the training.

If it's normal that appropriate documentation will always be provided for each performance, then it's only necessary to specify the exceptions to this rule – the times, for example, when the documentation won't be made available. It's sufficient to explain to students when they start training that they will always have the documentation they require – unless an objective tells them otherwise.

Once we do this, people start paying more attention to objectives:

> Given a problem with a modem interface, correctly perform the steps necessary to troubleshoot the malfunction to a failing circuit board so that, after replacing the failing board, a "pass complete" indication may be obtained from diagnostic software.

This sounds better, but there's still a lot that may be done to improve the objective.

Rule 3: There is no need to specify that things should be done "correctly."

It should be understood that the objective needs to be completed correctly or successfully. After all, it doesn't make sense to try to do something incorrectly or unsuccessfully. Otherwise, why do it at all?

This gives us:

> Given a problem with a modem interface, perform the steps necessary to troubleshoot the malfunction to a failing circuit board so that, after replacing the failing board, a "pass complete" indication may be obtained from diagnostic software.

Not bad, but it's still awfully wordy.

Rule 4: Use as few words as possible.

"Perform the steps necessary" is a phrase that is unnecessary and can simply be left out. Scrutinize the words you use in objectives as if you had to personally pay for them.

> Given a problem with a modem interface, troubleshoot the malfunction to a failing circuit board so that, after replacing the failing board, a "pass complete" indication may be obtained from diagnostic software.

Rule 5: Translate words of many syllables into words of fewer syllables

It's amazing what can be accomplished with simple language. "Troubleshoot the malfunction" can be translated into: "Find and replace the failing circuit board."

We now have:

> Given a problem with a modem interface, find and replace the failing circuit board so that a "pass complete" indication may be obtained from diagnostic software.

So far, so good. This is almost fun.

Rule 6: Begin every objective with an action verb.

The trouble with putting the word "given" at the start of an objective is that it tends to act as another obstacle for anyone reading it. It's something that has to be read through or around until the action verb is finally reached. After dropping the given, we are left with an objective that gets to the point a lot sooner. It immediately tells people what they are going to do. It begins with the expected behavior. No waiting.

This is what we get:

> Find and replace the failing circuit board in a modem interface so that a "pass complete" indication may be obtained from diagnostic software.

Now, that's nice and clear. But it may still be a little too much to swallow all at once.

Rule 7: If necessary, use more than one sentence to write the objective.

No one ever said that objectives had to be written as one sentence. In fact, two (or three) simple sentences are better than one long, complex sentence. In our example, a second short sentence can be used to specify the criteria:

> Find and replace the failing circuit board in a modem interface. Obtain a "pass complete" indication from diagnostic software.

Nice!

So there you have it: an objective that is clear, and concise. Because it is written as an instruction, it helps begin the instruction. It gives direction to learning. And, isn't that what objectives are supposed to do?

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By Michael W. Galbraith

Essential skills for the facilitator of adult learning

A vast number of individuals help adults learn in a wide variety of formal and nonformal educational settings such as universities, community colleges, vocational/technical institutes, businesses and industries, correctional institutions, churches, museums, voluntary organizations, community action agencies, armed forces, and a litany of others settings too numerous to list. Those helping adults learn carry such labels as facilitator, mentor, teacher, instructor, trainer, or adult educator. For the purpose of this article, the term facilitator will be used to refer to those individuals who help adults learn. Helping adults learn is a transactional process in which the facilitator interacts with learners, content, other people and material to plan and implement an educational program. The facilitator is in a sense a guide to learners who are involved in an educational journey. Knox (1986, p.xi) suggests however, that most facilitators "in adult education programs are expert in the content they teach, but they usually have little preparation in the process of helping adults learn".

This article will examine some of the essential skills needed by the facilitator to effectively help adults learn. First, general characteristics of an effective facilitator will be detailed as well as how interpersonal skills influence the teaching and learning transaction. Next, instructional planning skills that a facilitator should possess will be noted. Finally, teaching and learning transaction skills necessary to bring about effective learning will be provided.

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General Characteristics and Interpersonal Skills

Being technically proficient in the content area in which the instruction is being directed is paramount, as are the abilities to plan and administer educational programs. The facilitator must also possess personality characteristics and interpersonal skills that engender an image of caring, trust, and encouragement. Merge these desired characteristics together and an effective and meaningful experience can result, both for the facilitator and the learner.

A list of general characteristics and exemplary principles for instruction and practice has been noted in the literature. Knox (1980) suggests that a facilitator of adult learning should possess three areas of knowledge: knowledge of content, knowledge of learners, and knowledge of methods. The personality characteristics of the facilitator should suggest a sense of self-confidence, informality, enthusiasm, responsiveness and creativity. Apps (1981) found that the best qualities for a facilitator were those that showed an interest in students, possessed a good personality, had an interest in the subject matter, had the ability to make the subject interesting, and were objective in presenting subject matter and in dealing with learners. Draves (1984) echoes similar agreement by stating that an instructor of adults must have understanding, flexibility, patience, humor, practicality, creativity, and preparation. Acquisition and acceptance of these diverse characteristics suggest that an effective facilitator plays many roles within the teaching and learning transaction including role model, counselor, content resource person, learning guide, program developer, and institutional representative (Apps, 1981; Brookfield, 1986; Daloz, 1986).

Knowles and Associates (1984) identified seven components of andragogical practice (the art and science of helping adults learn) that suggest the skills and abilities a good facilitator should possess. The andragogical approach indicates that a facilitator must possess both technical and interpersonal skills to be effective. Central to the success of this approach are the personality characteristics and interpersonal and human relation skills of the facilitator in relationship to the adult learner.

Brookfield (1986) provides six principles of effective practice and indicates particular beliefs and characteristics associated with the facilitator of adult learning. Implicit in his framework are general characteristics and guiding principles of an effective facilitator in relationship to helping adults learn. It suggests that a facilitator should have an understanding of adult learners, provide a climate conducive to learning, provide a contextual setting for the exploration of new ideas, skills, and resolutions, provide a forum for critical reflection, and have the ability to assist adults in the process of learning how to change their perspectives, shift their paradigms, and replace their way of interpreting the world. Implementation of these principles requires the facilitator to be technically proficient in content and instructional planning areas as well as highly competent in interpersonal and human relation skills.

The attributes of caring and respect appear as central characteristics necessary to the success of the facilitator of adult learners as well as to the total process of helping adults learn. To develop a conducive instructional and learning climate, a high level of interpersonal and human relation skills is essential. Daloz (1986, p.xvii) states that the "element of good teaching becomes the pro-

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vision of care rather than use of teaching skills and transmission of knowledge."

Recognizing that caring, listening, and passion are powerful elements and the capacity to provide emotional support when it is needed are hallmarks of a good facilitator of adult learning. One could conceive of the interpersonal relationships that exist between the facilitator and adult learner as being connected by a gossamer thread that weaves itself throughout the various characteristics of each person involved in the learning experience. The thread is fragile that connects the facilitator and learner relationship and when poor interpersonal skills are exercised it snaps and tears apart. Developing and maintaining good interpersonal and human relationship skills is therefore vital to the facilitator of adult learning.

Instructional Planning Skills

Being technically proficient in the planning process of educational programs for adult learners is an essential component in the process of helping adults learn. Planning an educational program for adult learners is not a series of independent steps or processes, but an interactive and interrelated system. In this section, the instructional planning components of needs assessment, context analysis, objective setting, organizing learning activities, and evaluation, and the skills associated with each, will be briefly examined.

Needs Assessment

A needs assessment should identify the gaps between the learners' current and desired proficiencies as perceived by the learner and others. Needs assessment methods can range from highly informal and intuitive to highly formal and in-depth analysis (Cameron, 1988; Grotelueschen, 1980; Zemke & Kramlinger, 1982). Facilitators can decide to use a variety of data-collection procedures such as individual interviews, questionnaires, tests, observation checklists, self-assessment diagnostic instruments, surveys, performance analysis, or marketing analysis techniques to assess the most appropriate educational needs. As suggested, there are numerous methods for identifying learning needs, however, there is no consensus on the most appropriate method. The selected method will generate different types of information depending on who is involved in the assessment.

Acquiring skill in the needs assessment process can help facilitators of adult learning review their assumptions about the educational needs of potential participants. It can assist them in being responsive to the adult learner through appropriate selection of topics and materials. It can increase the likelihood that potential participants will participate if program descriptions emphasize the responsiveness to the educational needs identified, and, it can encourage adult learners to persist, learn, and apply what they learn if the program focuses on meeting their needs (Knox, 1986). The assessment of needs should be an ongoing process throughout the instructional planning activity in an effort to ensure that individuals' educational desired outcomes are congruent with intended course outcomes.

Context Analysis

Context analysis considers the societal trends and issues, the resources, the mission of the provider organization, and how it influences the process of helping adults learn (Knox, 1986). As a facilitator it is important to understand the impact of these influences on the learner and on the instructional process. Adult learners have perceptions of standards, expectations, and opportunities that are directly related to their purpose for being engaged in the enhancement of their proficiency level. Understanding these perceptions allows the learner and facilitator to contribute to the decisions on "using learning activities to strengthen problem-solving, specifying mastery levels, and helping learners use educational strategies that enable them to use or deflect influences that encourage or discourage them to learn and apply" (Knox, 1986, p.67). The contextual influences affect the facilitator and the adult learner and the decisions that can be made in a collaborative manner.

An understanding of the organizational mission, resources, priorities, trends, and constraints is essential when making decisions and arrangements for an educational program. Recognition of the various contextual influences of the organization can lead to planning and implementation of programs that are more likely to be successful and lead to a more meaningful and rewarding educational experience for the participants and the facilitator.

Setting Educational Objectives

Selecting and setting educational objectives should draw heavily from the needs assessment and context analysis information. How do you select educational objectives that should receive high priority? Knox (1980, 1986) proposes several useful procedures for setting objectives including using planning committees composed of participants, resource persons, and program coordinators, having all participants engage in a nominal group process, obtaining written and oral descriptions of successful practice to highlight intended outcomes, using an existing group of adults who have specified goals and develop an educational program with them, providing program time to agree on the objectives, and using reaction forms to ask participants to periodically identify the objectives that are most important and least important to them which can serve as a basis for modifying the program and educational objectives. Selecting and setting educational objectives should be a joint venture among the key players in the learning activity.

Setting objectives should be an ongoing and interactive process. Opportunities to modify the objectives must be present as the educational activities unfold since it is impossible to identify all the unplanned and unanticipated learning needs of the adult learner. Utilizing a collaborative approach to agreeing on the learning objectives, adult learners can increase their understanding of and commitment to achieving the objectives, understand the relationship between current and desired proficiencies, reflect on questions that need addressing, and acquire a framework for learning how to learn beyond the present program (Knowles, 1980; Knox, 1980; Smith, 1982). Facilitators can use the agreed upon learning objectives to help in the process of selecting materials, outlining content, deciding on methods of teaching and learning, and preparing evaluation procedures (Knox, 1986).

Organizing Learning Activities

The information and decisions that were made from the needs assessment, context analysis, and objective setting

activities result in the identification of the intended outcomes for the educational program. The facilitator must now have the skill to select and organize learning activities that will meet the intended outcomes.

The way that learning activities are selected and organized must be rational and based on the educational objectives, the adult learners' characteristics, as well as on the facilitator's own perspective and experience. Knowledge of the current proficiency levels and the preferred learning styles of the learners will aid in the selection of the most appropriate learning activities. The facilitator can develop a list of competencies that have been identified for the educational program and ask participants to check on a Likert-type scale the level at which they believe they are presently performing.

In terms of learning style preference, asking participants how they like to process information and what methods they like to use in that process is one easy and rather quick method of acquiring information (Galbraith, 1987). Analyzing the feedback can assist the facilitator in the selection of the most appropriate learning activities.

Selecting appropriate teaching and learning methods is also an important skill the facilitator must possess. A vast array of methods exist and each one is influenced by the content that the facilitator is teaching, the program and learning objectives, the desired outcomes, the characteristics of the learners, the size of the group, and the availability of time, equipment, facilities, and budget (Galbraith, 1989). The facilitator also needs skill in selecting and preparing educational and instructional materials.

The primary criteria for selecting materials should be the educational purposes they serve in conjunction with the learners' needs and learning styles. In selecting from the available materials, the facilitator should be concerned with how the materials help the learners meet the program objectives, and how appropriate and responsive the materials are considering the learners' background, current levels of proficiency, and motivation (Wilson, 1983). Many materials that are useful in helping adults learn are already available for purchase however many times the need arises for the facilitator to develop new materials that better fit the educational purpose of the program, learners' backgrounds and interests.

Evaluation

Program evaluation procedures can help determine if the participants in the learning activity reached their educational objectives and desired outcomes. They can be used in the planning process and for program improvement, and they can be used for program justification and accountability (Grotelueschen, 1980). One single evaluation procedure will not provide the facilitator with useful information about all aspects of the program (Deshler, 1984). Therefore, it is important to focus on specific components of the program about which evaluative data is desired such as needs, objectives, learning activities, participants, materials, facilities, and so forth.

Depending upon the resources, time, money, audience, purpose, and desired information, the facilitator can select evaluation data from various sources such as standardized tests, observation checklists, questionnaires, organizational records, interview guides, self-assessment inventories, and anonymous participant reaction forms. As with other components of helping adults learn, the adult learners must be actively involved in the evaluation process that is hopefully "grounded in, and derived from, some central features of adult learning" (Brookfield, 1986, p. 276). Facilitators are one of the main users of the evaluative findings, therefore, such findings can aid in their own improvement as a facilitator.

Teaching and Learning Transaction Skills

The teaching and learning process involves an understanding of adult learners, instructional planning, and an awareness of our own content expertise. In essence, it is how we as facilitators influence our adult learners and how they influence us in the process of helping them learn. To bring this about, facilitators need skills in building supportive and active educational climates and skills in providing challenging teaching and learning interactions.

The Educational Climate

An educational climate consists of two major components, the physical environment and the psychological or emotional climate. The physical environment should encourage the adult learners to participate. Facilities should be as attractive and comfortable as possible with good lighting and ventilation, colorful decor, appropriate temperature settings, a public address system (if in a large room), availability of refreshment canteens for breaks, and an absence of distracting sounds from outside the classroom. Utilizing tables and chairs, with five or six chairs to a table, is preferred by most adult learners. Arranging the tables and chairs into small circles or into a semi-circular arrangement allows active face-to-face communication with the facilitator and each learner, increases participation, and enhances the adult learning situation (Vosko, 1984).

The establishment of a psychological climate is also imperative. The first session of any educational program is vital and it is here that a climate for learning must be established that is supportive, challenging, friendly, informal, open, and spontaneous without being threatening and condescending (Knox, 1986). Facilitators should introduce themselves in a way that says "I am human and I want to assist you in an open, collaborative, and supportive manner." Having participants introduce themselves with some personal and professional information as well as reasons for participating in the class will help the facilitator gain valuable information but also help other participants realize that perhaps they are here for the same reasons. Facilitators also need to review the goals, objectives, and expectations of the program with participants and obtain feedback from them results of which may indicate that certain modifications may be necessary.

Adult learners are very capable of being involved in the planning process and should be given the opportunity. Building a climate of mutual respect, collaboration, mutual trust, support, and authenticity provides a strong psychological climate that is conducive to learning.

Providing Challenging Teaching and Learning Interactions

The teaching and learning interaction suggests that the facilitator and the adult learner are engaged in an active,

challenging, and supportive encounter. Providing challenging interactions requires an understanding of the instructional planning process, adults as learners, motivation strategies, and an understanding of one's philosophical and teaching style orientation to bring about a conducive educational activity (Galbraith, 1989).

How can facilitators bring about challenging and meaningful interactions? First, facilitators need to care enough to maintain standards and have high expectations for the adult learner. Daloz (1986) suggests that teaching is an act of caring and the promotion of development. Facilitators must care enough about adult learners to set up challenging tasks that call out for closure, while at the same time provide insight into how this new knowledge can be applied to their lives. In addition, providing realistic and varied practice opportunities will help adult learners persist and to apply what is learned. Facilitators should subdivide and sequence learning tasks from simple to more complex and establish a pace for learning that allows for individualization. A continuous process of feedback about how the learning activity is progressing is also essential (Knox, 1986). Finally, facilitators must provide reinforcement for satisfactory performance and make note of exemplary accomplishments.

Next, the need to develop and organize educational settings that demand the adult learners and facilitators to act and think critically and reflectively is imperative (Brookfield, 1987; Marsick, 1987; Schon, 1987). Brookfield (1987, p.1) suggests that this "involves calling into question the assumptions underlying our customary, habitual ways of thinking and acting and then be ready to think and act differently on the basis of this critical questioning." Central to helping adult learners think critically is the element of challenge. Challenge, according to Egan (1986), is the last stage necessary before an individual can develop alternative ways of thinking and acting. Facilitators can use various strategies to assist in the development of critical thinking such as critical questioning, critical incident exercises, criteria analysis, role playing, and crisis-decision simulations.

A meaningful teaching and learning transaction suggests that it must promote development, for the adult learner and for the facilitator. Daloz (1986, p.237) summons up what seems to reflect the most desirable outcome of the teacher and learner interaction by stating, "like guides, we walk at times ahead of our students, at times beside them, and at times we follow their lead."

Conclusion

Facilitating adult learning can be a challenging, exciting, and rewarding experience. A basic understanding of various skills can enhance and help guide those involved in this journey. Essential for the facilitator of adult learning is the development and acquisition of interpersonal skills, instructional planning skills, and teaching and learning transaction skills. Acquiring these essential skills allows the facilitator and the adult learner to promote meaningful development and growth. AAACE

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Facilitating the Next Steps: The Resources Needed

module 5

Objectives

In this part of the workshop, you will have the opportunity to:

- Begin developing a personal action plan for making changes in your interactions with adult learners.
- Begin networking with colleagues.
- Provide feedback on the workshop.

Individual Activity

Look back at your entries in each "Planning Ahead" section and write in the space below <u>one</u> action that you plan to take. List the resources (time, people, funds, etc.) that you would need to accomplish it.

Small Group Activity

Break into interest groups which correspond to topics covered in Modules 2, 3, and 4. Consider ways in which you can draw on your colleagues to complete your goals. Record contracts, actions, etc. below.

Individual Activity

Complete the Evaluation Form as indicated and return it to the workshop facilitator. Your feedback is critical in preparing for future workshops.

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